

Coonawarra regional vintage summary

COONAWARRA VINTAGE OVERVIEW

Vintage report

The Coonawarra 2001 harvest finished one and a half weeks later than usual, with the last grapes harvested on the 18th May.

The season commenced with a good fruit set, after which a summer 'heat wave' created some worry with severe leaf stress affecting photosynthesis. January's mean maximum temperature was 3°C above average, and there were 8 days above 38°C in that month alone.

While the rains in March threatened a repeat of the wet March of 1983, and the devastating effect that had on the later ripening fruit of that vintage, this did not eventuate. The weather turned favourable, allowing growers to relax through fine sunny periods as the disease risk diminished.

The milder weather later in the season resulted in fruit of excellent colour and bold ripe flavours with good tannin structure, although without some of the varietal distinctiveness and heavier characters. The winemakers are very happy with the quality, while it may not have the delicate subtlety to rival the classic vintages of 1990, 1991 and 1998. High sugar levels were a feature of the earlier ripening vineyards while some younger and higher yielding blocks ripened more slowly as they struggled to reach the minimum 12.5° baumé level.

Overview of vintage statistics

There were over 53,000 tonnes crushed in Coonawarra this year. This record-breaking vintage in Coonawarra was more than double that of last year, and made its production equal to that of the Barossa Valley and McLaren Vale, where two years ago it produced less than half what each of the other two regions produced.

This dramatic increase in production is attributable to 10% - 30% increases in yield from established vines, and large numbers of new plantings coming into production. Such a massive increase resulted in a significant oversupply of fruit in all the major varieties – with the wineries' own grown fruit alone exceeding their total preferred tonnages for Merlot, Pinot Noir, Shiraz, Chardonnay and Riesling.

Weighbridge prices were down by around 10% overall, with Merlot hit particularly hard (down by \$400 per tonne). Riesling (5% increase) and Sauvignon Blanc (8%) were exceptions to this trend. A higher proportion of contracts with quality bonuses built in, the effects of oversupply and sales of uncontracted fruit, young vines coming into production and lower average baumé levels in most varieties are all possible contributors to this reduction in average weighbridge prices.

The forecasts for Coonawarra indicate that little further growth is anticipated. Only 10% growth in reds, and 5% in whites is forecast between 2002 and 2006, with the demand in 2006 for the major varieties being still lower than the 2001 actual crush. Supply and demand are expected to be generally in balance across the forecast period.

The dominant variety by far is expected to be Cabernet Sauvignon, with double the production of its nearest rival, Shiraz.

There were no new plantings of white varieties in 2000, and red plantings were one-third the amount planted in 1999. However, there are over 600 hectares of vines still to come into production in Coonawarra, with another 500 approximately that are not yet in full production. It is estimated that there are already nearly 500 hectares more in the ground than are required to meet the projected demand in 2006 (see page 19).

COONAWARRA TONNES CRUSHED BY VARIETY - VINTAGE 2001

Table 6.1

Variety	Total winery grown	Total other growers	Total crushed	Total preferred	Tonnes from other growers as % of total	% of demand supplied	Number of wineries reporting tonnages (> 0) for		
							Own	Purchased	Preferred
RED									
Barbera	1	0	1	2	0%	50%	1	0	1
Cabernet Franc	534	174	709	536	25%	132%	14	4	15
Cabernet Sauvignon	19255	7459	26714	21538	28%	124%	22	25	37
Grenache	7	0	7	0	0%		1	0	0
Malbec	293	0	293	197	0%	149%	5	0	4
Merlot	2482	702	3184	2474	22%	129%	19	11	24
Meunier	41	0	41	40	0%	103%	3	0	3
Other red	0	0	0	0	0%	100%	1	0	1
Petit Verdot	91	4	94	100	4%	95%	7	1	7
Pinot Noir	1639	71	1710	1105	4%	155%	9	3	10
Shiraz	9781	2122	11902	8330	18%	143%	19	11	22
Tempranillo	1	0	1	2	0%	50%	1	0	1
Total RED	34124	10533	44656	34324	24%	130%			
WHITE									
Chardonnay	4637	1021	5659	3716	18%	152%	12	10	17
Other white	13	0	13	0	0%		1	0	0
Pedro Ximenes	14	0	14	14	0%	100%	1	0	1
Riesling	1756	60	1816	1584	3%	115%	7	2	8
Sauvignon Blanc	634	201	835	591	24%	141%	8	3	10
Semillon	112	0	112	108	0%	103%	5	0	5
Traminer	20	0	20	20	0%	100%	1	0	1
Total WHITE	7186	1282	8468	6032	15%	140%			
Grand Total	41310	11815	53125	40356					

COONAWARRA PRICE AND BAUME DATA - VINTAGE 2001

Table 6.2

Variety	weighted average weighbridge		weighted average baumé	lowest	highest	estimated total value		
	price*			price**	price**	purchased grapes	total grapes	
RED								
Cabernet Franc	\$2,010	100%	13.0	100%	\$1,200	\$2,220	\$350,444	\$1,424,054
Cabernet Sauvignon	\$1,930	96%	12.8	89%	\$500	\$3,200	\$14,399,656	\$51,570,606
Merlot	\$1,769	100%	13.0	88%	\$800	\$2,600	\$1,242,239	\$5,631,966
Petit Verdot	\$1,673	100%	11.7	100%			\$6,040	\$158,081
Pinot Noir	\$1,219	100%	10.3	100%	\$900	\$1,430	\$87,088	\$2,084,083
Shiraz	\$1,711	99%	12.8	90%	\$800	\$2,650	\$3,630,725	\$20,367,387
Total RED							\$19,716,192	\$81,236,177
WHITE								
Chardonnay	\$1,157	98%	11.7	78%	\$800	\$1,620	\$1,181,185	\$6,545,227
Riesling	\$844	100%	11.1	92%			\$50,632	\$1,532,723
Sauvignon Blanc	\$1,365	100%	11.9	100%	\$800	\$1,500	\$274,414	\$1,139,184
Total WHITE							\$1,506,231	\$9,217,135

* Note: this price does not include end use or other bonuses not paid at the weighbridge

** The absence of lowest and highest prices means that fewer than three wineries supplied pricing data for each variety.

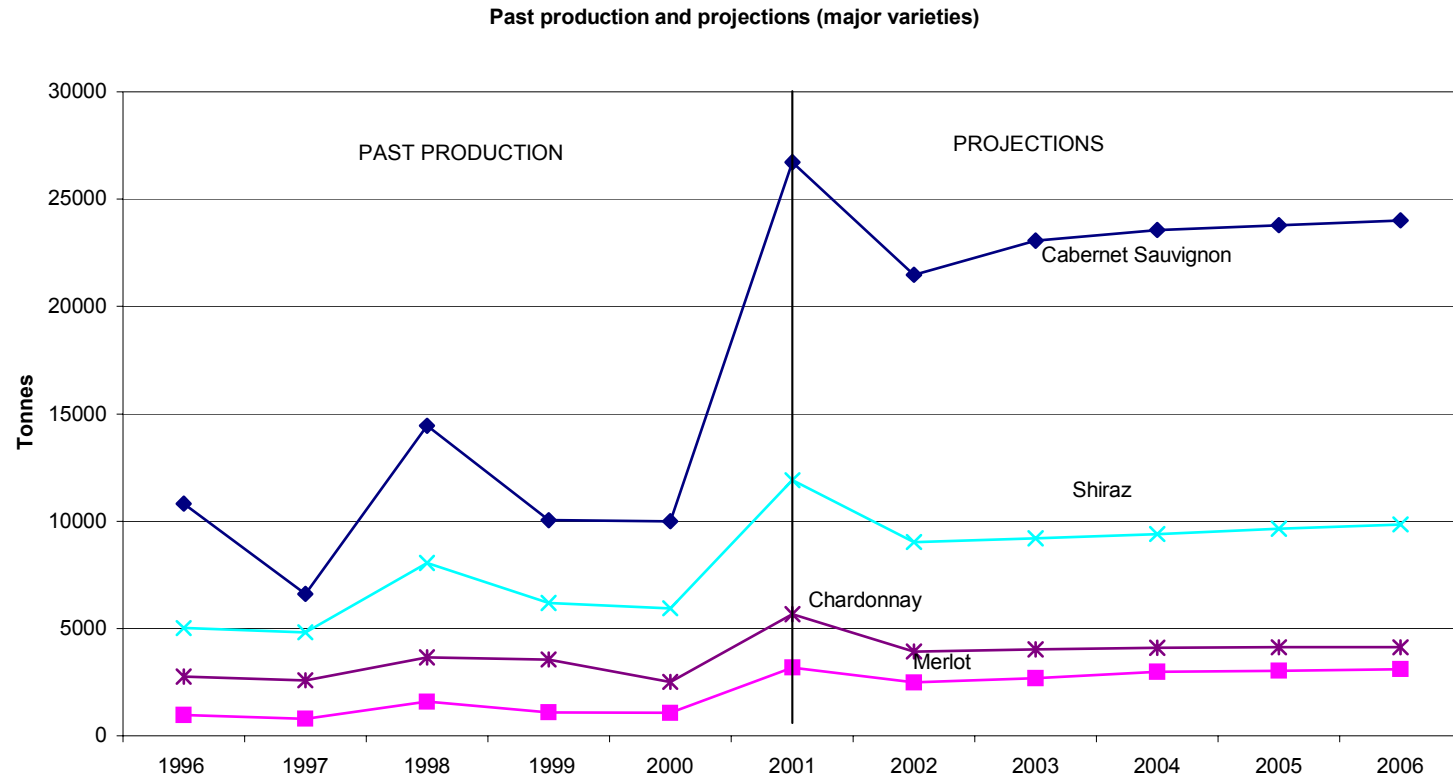
COONAWARRA ESTIMATED AND PREFERRED FUTURE INTAKE OF GRAPES 2002 TO 2006

Table 6.3

Variety	2002		2003		2004		2005		2006	
	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>	<i>estimated</i>	<i>preferred</i>
RED										
Barbera	2	2	2	2	2	2	2	2	2	2
Cabernet Franc	524	380	518	374	520	375	521	377	523	378
Cabernet Sauvignon	21479	21100	23056	22388	23556	23124	23794	23799	24001	24108
Malbec	173	143	173	143	173	143	173	143	173	143
Merlot	2484	2500	2675	2675	2980	2957	3044	3032	3110	3133
Meunier	22	22	22	22	22	22	22	22	22	22
Petit Verdot	89	95	99	100	116	110	116	110	121	110
Pinot Noir	1363	1354	1400	1421	1437	1460	1451	1488	1435	1504
Shiraz	9025	8451	9200	8930	9384	9264	9655	9579	9832	9901
Tempranillo	7	2	7	2	7	2	7	2	7	2
Total RED	35168	34049	37152	36057	38197	37459	38785	38554	39226	39303
WHITE										
Chardonnay	3924	4083	4022	4253	4093	4346	4121	4454	4123	4545
Other white	9	0	9	0	9	0	9	0	9	0
Pedro Ximenes	20	20	20	20	20	20	20	20	20	20
Riesling	1380	1441	1383	1461	1383	1488	1383	1510	1383	1528
Sauvignon Blanc	589	592	618	621	635	640	653	655	665	665
Semillon	31	33	31	38	31	38	31	38	31	38
Traminer	36	36	36	36	36	36	36	36	36	36
Total WHITE	5988	6205	6118	6429	6206	6568	6253	6713	6267	6832

COONAWARRA PAST PRODUCTION AND PROJECTIONS FOR MAJOR VARIETIES 1996 - 2006

Figure 6.1



COONAWARRA PLANTINGS BY VARIETY

Table 6.4

Variety	Year planted - area in hectares					Total	% planted in 2000
	Pre-97	1997	1998	1999	2000		
RED WINEGRAPES							
CABERNET FRANC	41	-	-	-	-	41	0%
CABERNET SAUVIGNON	1733	317	365	285	103	2804	4%
MALBEC	16	-	-	-	-	16	0%
MERLOT	168	36	51	62	27	344	8%
PETIT VERDOT	9	0	1	14		25	0%
PINOT NOIR	106	-	-	5	7	118	6%
SHIRAZ	746	26	50	89	20	931	2%
OTHER RED	5	-	-	-	-	5	0%
TOTAL RED WINEGRAPES	2824	379	466	455	157	4282	4%
WHITE WINEGRAPES							
CHARDONNAY	341	12	6	9	-	367	0%
RIESLING	225	-	-	5	-	231	0%
SAUVIGNON BLANC	48	-	6	9	-	63	0%
OTHER WHITE	7	5	-	1	-	14	0%
TOTAL WHITE WINEGRAPES	621	17	12	25	-	674	0%
TOTAL ALL VARIETIES	3445	396	478	480	157	4957	3%

Includes the hundreds of Comaum, Grey and Penola.